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P-CARD USER MANUAL

ADDING A PROXY VERIFIER

INTRODUCTION

A proxy verifier is person who can verify transactions in place of the card holder. You can add a new user as a proxy verifier or add proxy card numbers to an existing P-Card user.

TO ADD A NEW PROXY VERIFIER

1. Select **Add User**.

Figure 1 - Add User

The screenshot shows a web application interface for user management. At the top, there is a navigation bar with links: Reports, App Menu, Statewide Acct, Logoff, Back, and Master Admin. Below this is a sub-navigation bar with links: Maintain PCA, Maintain CC, Add User (highlighted with a red circle), Agency Settings, Posted Pending, and Outstanding CC. The main content area displays 'All Users' followed by an alphabetical index A-Z. Below the index is a 'Last Name' search field and a 'Find' button. There are also radio buttons for 'All Roles', 'Admin', 'Verifier', 'Verifier All', 'Approver', 'Approver All', 'Auditor', 'Active', 'NonActive', and 'All Users'. At the bottom, there is a table with columns: Edit, Last, First, Middle, Email, Holder, Active, Created, and PCA/Ind. The table contains one row for a user named ALLEN ARVILLA with email aallen@idl.idaho.gov, who is a holder, active, created on 6/2/2004, and has PCA/Ind 71011.

Edit	Last	First	Middle	Email	Holder	Active	Created	PCA/Ind
	ALLEN	ARVILLA		aallen@idl.idaho.gov	✓	✓	6/2/2004	71011

2. The **User Lookup** menu will appear. Type the last name of the new user in the **Last Name** field. (You can type the first few letters of a user's name if you are not sure exactly how it is spelled.)
 - a. To add an employee from another agency, type the last and/or first name and enter their agency number in the **Agency** field.
3. Click **Find**. If the user cannot be found, contact your payroll administrator to make sure that the user has been added to state payroll records.

Figure 2 - User Lookup

Click **Select** next to the user's name to add and then click **OK** to confirm adding the user.

TO SET UP THE NEW USER AS A PROXY VERIFIER

4. Verify the name and e-mail of the user. If it is not correct, contact your payroll administrator to make sure that the user has been added to state payroll records

Figure 3- User configuration

5. Select **Active P-Card User** to give the user access to the P-Card application.
NOTE: If a user cannot access to the P-Card application even after you have added them, contact SCO at dsahelpline@sco.idaho.gov.
6. Select **Verifier**.
7. To add proxy card numbers, enter the last six digits of the card number in the **Proxy Cards** field and click **Add**. The card number and card holder will be displayed for whom the user will be a proxy.
8. After the user configuration is complete, click **Save** (on the top menu bar).

TO ADD AN EXISTING USER AS A PROXY VERIFIER

1. Click the edit icon next to a user's name to update their set up.

Figure 2 - Edit icon

The screenshot shows a web application interface with a top navigation bar containing 'Reports', 'App Menu', 'Statewide Acct', 'Logoff', and a 'Back' button. Below this is a sub-navigation bar with 'Maintain Loc', 'Maintain PCA', 'Maintain CC', 'Add User', 'Agency Settings', 'Posted Pending', and 'Outstanding CC'. A search bar for 'All Users' is present. The main area displays a table of users with columns: Edit, Last, First, Middle, Email, Holder, Active, Created, and PCA/Index. The user 'ANDERSON, MARILYN' is highlighted, and the 'Edit' icon next to her name is circled in red.

2. The user's configuration screen will open.
3. To add proxy card numbers, enter the last six digits of the card number in the **Proxy Cards** field and click **Add**. The card number and card holder will be displayed for whom the user will be a proxy.

The screenshot shows the user configuration screen for 'PAT LOER'. It includes fields for First Name, Middle, Last Name, and E-mail. There are checkboxes for 'Active P-Card User' and various roles (Verifier, Approver, Auditor). The 'Credit Cards' section has a table with columns 'CC#', 'Active', and 'Description'. A red message states 'Credit Card '111111' added to Proxy list.' Below this, the 'Proxy Cards' section shows a table with columns 'CC#', 'Card Holder', and 'Del'. The card '111111' is listed with the holder 'CRANE RHONDA'.

4. After the user configuration is complete, click **Save** (on the top menu bar).

TO USE MAINTAIN CC TO ADD A PROXY VERIFIER

NOTE: **Maintain CC** assigns existing P-Card users to a card whereas when you add or update an existing user to be a proxy verifier, you assign cards to the user.

1. Click **Maintain CC** on the Administration screen.

Figure 1 - Maintain credit card button

The screenshot shows the same web application interface as Figure 2. In this view, the 'Maintain CC' button in the sub-navigation bar is circled in red. The user table below shows 'ALLEN, ARVILLA' as the first user.

A list of your agency's credit cards and the associated card holder will be displayed. The list can be sorted ascending/descending by clicking the column headings (**CC#**, **Card Holder**, etc.) The column headings include:

- **CC#** – the last six digits of the P-Card.
 - **Active** – Indicates if the card is active in the P-Card application.
 - **Description** – A description you entered when setting up a new user.
 - **Card Holder** – The name of the card holder. A card holder that is inactive in the application is indicated in red. (Missing transactions can often be attributed to users that were made inactive before the transactions were uploaded from MasterCard.) NOTE: If *both* the card and the card holder are inactive, the card holder name will not be in red.
2. Click the card number (**CC #**) to which you want to assign a proxy verifier.
 3. Click the down arrow of the **Proxy Verifier** menu and click the name to add.
 4. Click **Add** to add the proxy verifier to the card.

Figure 2 - Add Proxy Verifier

The screenshot displays the P-Card application interface. On the left, there is a table with columns: CC#, Active, Description, and Card Holder. The table lists various credit cards, some of which are inactive (indicated by red text for the card holder name). On the right, there is a form to add a proxy verifier. The form includes fields for CC# (012012), Active (checked), Card Holder (COOK PEGGY), and Description. Below these fields are 'Save' and 'Delete' buttons. At the bottom, there is a 'Proxy Verifiers' section with an 'Add' button and a list of names: ACEVEDO MARILYN K, ADAMS JENNIE, ADAMS M JOYCE, and ADAMS SANDY. A mouse cursor is pointing at the 'Add' button.

CC#	Active	Description	Card Holder
001123	✓		DORAN SUSAN K
001131	✓		KINGHORN TRACIE
007856	✓		MILLER DIANE
007864	✓		JAMES ELAINE (Inactive)
007872	✓		THOMPSON BILL
010736	✓		LOOSLI ANGELA
012369	✓		COOK PEGGY
013144	✓		OSTWINKLE MARY
017285	✓		NUDELL NIKIAH G
017293	✓		HINEMAN JAIME
017301	✓		WHITE MARGARET PEG
017319	✓		MARTIN KAREN (Inactive)
017327	✓		PERRY KENNETH
026781	✓		TORRES ARMANDO
026799	✓		CHRISTMAN ALISA
026807	✓		FULLER SHELLIE BURRIS
026815	✓		LIME SAND DAVID

5. To remove a proxy verifier, click **Del** next to the name.